



Version 3.2 Upgrade Guide

Brooks Internet Software, Inc.
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Upgrade From...

- » [Version 3.0 or 3.1](#)
- » [Version 2.0](#)

Upgrade from version 3.0 or 3.1

There are a number of considerations when upgrading ExcelliPrint.

- 1 **Do not upgrade without testing.** Although ExcelliPrint is tested thoroughly, we do not have the ability to test it for each and every user. Prior to upgrading your production system, we recommend testing ExcelliPrint extensively. The ExcelliPrint 21-day trial can be used for pre-production testing.
- 2 **Some font changes in ExcelliPrint might affect the look of printouts**, so printed documents could look different.
- 3 **You can upgrade from version 3.0 or 3.1** simply by installing the latest version without uninstalling your current version. Printer settings from these versions will be preserved automatically.
- 4 If you want to upgrade to the latest version, your Software Upgrade Maintenance ([SUM](#)) **must be current**. Please contact us if you have questions about your SUM status.

Upgrading 3.0 or 3.1

- 1 **Download ExcelliPrint.** Download the latest **trial version** of ExcelliPrint, either [Premium](#) or [Standard](#), from our [website](#).

Note: Make sure there are no sessions currently active prior to upgrading. Any active connections will be closed. Sessions can be found in the Input tab of the ExcelliPrint printer settings.

- 2 **Install.** Install the latest version of ExcelliPrint by running the ExcelliPrint installer. You will be asked whether you want to upgrade ExcelliPrint. Click Yes to continue.
- 3 **Verify.** Verify the ExcelliPrint license is unlocked. If not, or if it's in trial, follow the activation instructions at www.brooksnet.com/unlock.html. Also verify your ExcelliPrint printer settings were transferred correctly.
- 4 **License Printers.** If your license was in trial mode, and you purchased more than one ExcelliPrint Printer, you will need to activate your additional output destinations.
- 5 In the Brooks License Manager, open the Module Status tab, highlight the IPDS Printers module, and click License Module. This opens the Module Activation Wizard. Click Next.
- 6 Select Internet Activation and click Next.
- 7 Enter your original Sales Receipt or Invoice Number and Auth Code. In the Quantity field, enter the total number of ExcelliPrint Printers. Click Next.
- 8 If you use a Proxy server, enter your information. Otherwise, click Finish. If successful, you will see a success message. If the activation failed, you will see an error message describing the reason for failure. Try again later or [contact](#) your sales representative for assistance.

Upgrade from version 2.0

There are a number of considerations when upgrading from ExcelliPrint 2.0.

- 1 **Do not upgrade without testing.** Although ExcelliPrint is tested thoroughly, we do not have the ability to test it for each and every user. Prior to upgrading your production system, we recommend testing ExcelliPrint extensively. The ExcelliPrint 21-day trial can be used for pre-production testing.
- 2 **You cannot upgrade from version 2.0** by installing the latest version. Printer settings from version 2.0 will not transfer automatically to version 3.1. For this reason, **you will need to take note of your current settings before uninstalling 2.0.** The steps and table below will help with this transition.
- 3 If you want to upgrade to the latest version, your Software Upgrade Maintenance ([SUM](#)) **must be current.** Please contact us if you have questions about your SUM status.

Recording ExcelliPrint 2.0 Settings

- 1 Log in to ExcelliPrint 2.0 at the admin level. Use the following table to record your current printer settings in ExcelliPrint 2.0:

Version 2.0 Settings	Value	Current Version...
In the Devices tab, click each device to access the Device Properties page. Click Modify in the Device ID box to open the Modify Device Properties page. Record the following values:		
Device ID		Click the Printers tab and enter the Device ID at left in the Add Printer field to add a printer. You can also click the Default printer and modify it to match the settings below. The Modify Printer Properties page has three tabs: Input, Emulation, and Output.
Device Type [Printer or folder]		Printer > Output tab: Select Printer or Folder.
Description		Printer > Output tab : Enter this value in the Description field.
Run As [User and permissions]		Printer > Output tab : Use the default user or click Add New User to add specific user and permission information.

Archive Directory/Printer		Printer > Output tab : Select the printer or enter the archive directory.
Save As		Printer > Output tab : Select the save as type.
IPDS Emulation		Printer > Emulation tab: Select the IBM printer.
Codepage		Printer > Emulation tab: Select the codepage.
Intelligent Job Separation [On or off]		Jobs are separated differently than before, so this option is no longer needed
In the Devices tab, click each device to access the Device Properties page. Then click Modify in the Paper Sizes box to open the Paper Size Properties page. Record the following values:		
Bin 1		Printer > Emulation tab: Select the paper size.
Bin 2		Printer > Emulation tab: Select the paper size.
Bin 3		Printer > Emulation tab: Select the paper size.
Bin 4		Printer > Emulation tab: Select the paper size.
Bin 5		Printer > Emulation tab: Select the paper size.
Bin 6		Printer > Emulation tab: Select the paper size.
Crop Output... [On or off]		Printer > Emulation tab: Select value.
In the Devices tab, click each device to access the Device Properties page. Then click Margins if it is available for the device to open the Device Margins page. Record the following values:		
Use Margins [On or off]		Printer > Output tab: Select Use Margins.
Top		Printer > Output tab: Enter value.
Bottom		Printer > Output tab: Enter value.

Left		Printer > Output tab: Enter value.
Right		Printer > Output tab: Enter value.
Unit		Printer > Output tab: Select value.
Fit printed pages... [On or off]		Printer > Output tab: Select value.
In the Devices tab, click each device to access the Device Properties page. Then click Watermarks if it is available for the device to open the Modify Device Watermarks page. Record the following values:		
Use Watermarks [On or off]		Printer > Output tab: Select value.
Options		Printer > Output tab: Select option.
Watermark 1		Printer > Output tab: Enter value.
Watermark 2		Printer > Output tab: Enter value.
In the Ports tab, note each port and related device:		
Port/Device		Printer > Input tab: Add port to appropriate printer's Input tab.
Port/Device		Printer > Input tab: Add port to appropriate printer's Input tab.
Port/Device		Printer > Input tab: Add port to appropriate printer's Input tab.
From the Log tab, select Options to open the Log Options page. Record the following values:		
Remove Items Older Than		Status > Change Log Options. Enter value.
Log Directory		Status > Change Log Options. Enter value.
From the Help tab, select Accounts to open the Login Accounts page (the password will not be displayed). Record the following values:		
Account/Role		Home > Manage Users. Add user, assign role/password.
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Account/Role		Home > Manage Users. Add user, assign role/password.

Note: In the above table, the third column indicates where the recorded value will be entered in the latest version.

- 2 When you have recorded the above values, uninstall ExcelliPrint 2.0 using the Add or Remove Programs utility in the control panel.
- 3 **Install.** Install ExcelliPrint Premium by running the ExcelliPrint installer. Click Yes to continue.
- 4 **Software Activation.** Click [here](#) for activation instructions.
- 5 **Module Activation.** In the Brooks License Manager, open the Module Status tab, highlight the IPDS Printers module, and click License Module. This opens the Module Activation Wizard. Click Next.
- 6 Select Internet Activation and click Next.
- 7 Enter your original Sales Receipt or Invoice Number and Auth Code. In the Quantity field, enter 2. Click Next.
- 8 If you use a Proxy server, enter your information. Otherwise, click Finish. If successful, you will see a success message. If the activation failed, you will see an error message describing the reason for failure. Try again later or [contact](#) your sales representative for assistance.